



Successful Collaborations Ann Marie Dinkel, MBA, RLATG, May/June 2006

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Finding a competent and compatible consultant takes more than choosing among a few resumes. Defining desired outcomes, timeframes, and expectations of the project can go a long way toward building a positive working relationship with an outside expert.

A quick check of the classified section of any industry journal demonstrates the ongoing need for experienced staff, from entry level technician to veterinarian. Clearly, the boom in biotechnology is straining the current resources of many research facilities. One solution to the ups and downs of project cycles is the employment of short-term consultants or contractors. In this industry, people are most familiar with the role of the consulting veterinarian, and outsourcing daily animal care and/or technical duties to contractors, but there are many circumstances where a consultant can be beneficial.

Finding the right person to collaborate with can be daunting, and developing an ongoing working relationship with a consultant, or any outside contractor, can be a pleasant experience or a nightmare. The process presented can ease selection and working relationship concerns to resulting in a final product that meets the needs of the organization.

Management, scientific, and technical consulting services, according to the Bureau of Labor Statistics, rank among the fastest growing industries through the year 2014. Outsourcing expertise is a trend in many industries, especially as the cost of full-time skilled labor rises. Even highly paid executive positions are filled temporarily. In 1995, professionals, technical workers, and health-care personnel accounted for 25% of the temporary staffing industry payroll. By 2001, that number had increased to 35% (Figure 1).


Why use a consultant?

Hiring a consultant or outside contractor can provide short term relief for overextended staff, accomplish a critical project while normal operations continue, prepare for an extraordinary event, or provide a critical outside evaluation of ongoing operations. Consultants also bring expertise to an organization which may be lacking in the management or staff.

Consultants are hired to solve a short term problem, get paid, and move on to the next project. The learning curve is short, they require little support from the organization and the projects are generally time-limited, making a consultant cost effective if the change results in improvements to the organization. The expense of a consultant drops away as soon as the project is completed and the final report accepted, so the financial burden is transient.

For institutions suffering from rapid growth without the ability to hire additional full-time employees, hiring an independent contractor or a consultant is one option to assure that the facility continues to operate effectively and meet critical deadlines.

When is a consultant useful?




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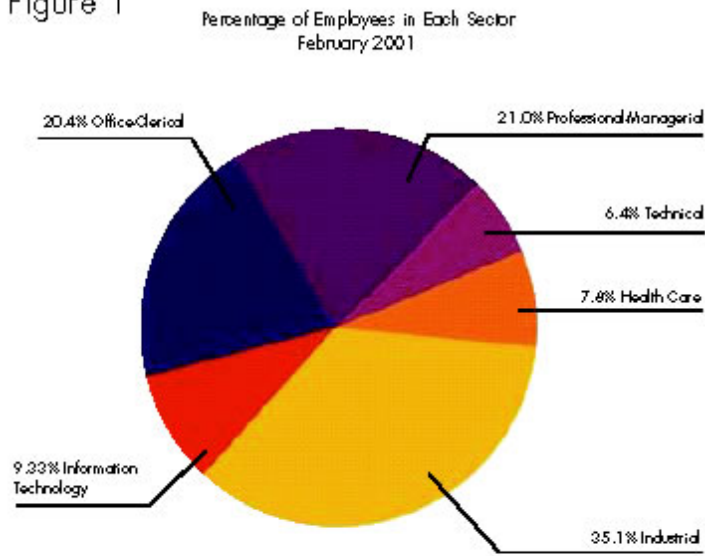
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In this industry, there are many occasions when hiring a consultant makes a good deal of sense. A consulting veterinarian may be a cost effective alternative to a full-time veterinarian; a training consultant may be easier to justify than creating a full-time training position. Each organization is different, but consultants can provide specialized support in a number of situations including:

- Providing a “fresh set of eyes” to evaluate a program for a specific purpose, such as disaster planning or AAALAC, International accreditation;
- Guiding the planning phases of a new project, such as a building or a renovation;
- Working as the “extra set of hands” to provide support to complete a short term project that can’t be incorporated into the existing schedule, such as SOP development or review;
- Filling a gap when the organization lacks the proper experience or understanding to solve a problem, such as learning a new animal model or surgical training.

Figure 1



Source: American Staffing Association analysis of unpublished data from the U.S. Bureau of Labor Statistics.

Defining the Project

Once the decision has been made to use an outside contractor, the first step is to define needs and expected outcomes (Table 1). Whether designing a building, pursuing AAALAC, Int'l. accreditation, or requesting a training program, the outcomes must be clear. Outcomes can be staff certification, a complete training curriculum, accreditation, a new or renovated facility, or a completed disaster plan. When writing the description of the project, be very specific and incorporate details, including suggested references, specific time frames, and clear expectations of the finished product. The only way to get the desired results is to clearly communicate them for the consultant.

The consultant is hired to fulfill a vision or solve a problem, so that vision or project must be clearly defined from the beginning. Include specific benchmarks and deadlines, tying payments to meeting those benchmarks. In this way, if the project is terminated for any reason, payments will be concretely based on deliverables at each stage of the project. Providing clear outcomes and benchmarks removes the possibility of an overly creative interpretation, possibly leading to

different outcomes.

Include a mechanism for progress reports, either written or verbal, to keep the project on track and on time. The reports can be formal or informal, but it forces constant communication between the organization and the contractor.

Identify the contact for the project. The contact should understand the project and have authority to make decisions and handle interfaces with other departments, including Human Resources or Accounts Payable. This facilitates progress and speeds problem resolution.

Table 1: Questions for project definition

- What tasks in the organization can be outsourced?

- Is it reasonable to outsource this project?

- Can this project be completed within the timeframe established?

- Does the completion of this project offer a tangible benefit to the organization?

- Where will the work be performed?

- Are there any legal questions to address?

- Why is it reasonable to outsource this project?

- What are the desired outcomes of the project?

- What knowledge or skills are required to perform the task?

Determining Necessary Qualifications

After internal agreement of project outcomes, the next step is to identify the necessary consultant qualifications. Qualifications will vary with the project, and must be clearly stated. For example, a training contractor should have demonstrated experience in teaching or training, including an understanding of adult learning styles. Different knowledge, skills, and experience would be identified for a facility design project. In every case, communication skills are important to the success of the collaboration, no matter what the project. The project outcomes and consultant qualifications become the heart of the final Request for Quote (RFQ).

Selecting the Right Consultant

There are many well-qualified and credentialed consultants in the field. Narrowing the field and selecting a compatible contractor can be daunting. People tend to be most comfortable working with people that are familiar, either by name or reputation. In this tight-knit community, there are many networking opportunities to identify potential candidates. Sometimes a candidate may not be a good fit, but can serve as a source for additional names. If applicable, check with previous contractors who provided satisfactory results to gauge their interest and fit for the current project. Some consultants have a wide breadth of experience, enabling them to undertake a wide variety of projects.

Consultant selection may be competitive or sole sourced. Selection is simplified if the field is narrowed to a few potential candidates, based on pre-selection interviews. These phone interviews can weed out consultants with incompatible qualifications and those with no

interest in the project. Focus these screening interviews on the desired outcomes and how the candidate views and interprets them. Complete this process to pre-qualify candidates to receive the RFQ.

Identify the minimum criteria you are willing to accept. In many circumstances, experience trumps education, so do not rule out potential consultants based strictly on educational criteria. It is more important that the person have a strong background in the industry, with a proven track record of results. A consultant should be prepared to present a resume or CV that demonstrates the needed expertise and/or experience in the industry. For example, if a trainer is needed, the resume should show past programs presented; if the need is a contractor to start up a new program or critique an existing program, the resume should indicate the experience relating to that task or type of project, such as personal experience managing a program.

Resumes do not tell the entire story. Check references, including past customers with similar projects, to assure a good fit with the program.

After reviewing the RFQ responses, make a final cut. The final set of interviews should focus on the project, probe for knowledge, creativity, relevant experience, and understanding the project. Just like interviewing a potential new employee, the process must be give and take, to ascertain if both parties can collaborate to bring the project to fruition. Encourage your prospect to ask questions and make suggestions, and be open to them. The result may be better than the original proposal. An experienced consultant has seen similar situations in other settings and may shed light on areas not previously identified as part of the problem or part of the solution.

Working with a consultant is a collaborative process. The organization has a need, and the contractor must be able to fill that need by understanding the problem and offering customized solutions. Beware of any consultant who indicates that there is a one-size fits all solution to the problem, especially early in the discussion. Every facility and every situation is unique, so the consultant needs to be a fit with the organization and the primary contact.

Forming a Working Relationship

Hiring a consultant is a matter of trust with long term ramifications for the organization. Success depends on shared expectations. In many cases, a confidentiality document is required. Issues of who owns the finished product must also be resolved. An ongoing dialogue is needed to be sure that everyone stays on the same page throughout the course of the project. This is especially important for longer term projects. Established benchmarks and regular discussions ensure the consultant does not stray from the original objectives. They also keep the project from veering off track, which can lead to time and cost overruns.

Getting Results

How can the nightmare of a bad consultant be avoided? Successful collaborations require a number of elements to mesh — expectations, project understanding, clear deadlines, communication, and trust.

Understanding needs is only one part of the process; seeking points of agreement along the way; identifying milestones for deliverables; being clear about final outcomes; and feeling comfortable that the consultant shares a vision and understands the entire scope of the project all combine to make collaborations work. It is almost impossible for the seeker to identify in advance all the support actually needed from the consultant. A good consultant will ask

questions, clarify needs, develop a shared understanding of specific steps to the desired outcome, and make useful suggestions that may broaden or narrow the project scope as the situation evolves.

Benchmarks are a must to keep the project on target and on time. During the initial meeting, identify deliverables and time frames for them. These can be written into the final agreement so there is no confusion.

Finally, it is important to clearly state the form and format of the final deliverable. What data should be included in a final report? How is that data expressed? Usable data is the goal of the project, so the format and extent of data need to be clear. If the project produces an object other than a report, it should be in a form that meshes with the organization's internal documents.

Collaborative work with a trusted consultant can produce exceptional results. Clearly defined parameters and benchmarks combined with ongoing communication focuses effort to keep the project on time, on budget, and on target.

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Ann Marie Dinkel, MBA, RLATG is an independent consultant in training and facility management, with over 25 years of facility management experience. Training and Operations Consulting Services, Lewes, DE (302)381-4220; Adinkl@msn.com.

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